

AmeriCorps State and National New Grantee Checklist

Purpose

Leverage this checklist to ensure the necessary steps are taken to develop an AmeriCorps project during the post-awarding project setup period. If you have any questions about the tasks below, be sure to reach out to your Portfolio Manager or State Commission contact.

Getting Acquainted with AmeriCorps

Done?	Task	Purpose and/or Additional Context
	Review AmeriCorps strategic plan	Review the strategic plan and understand how your program fits.
	Learn about the history of national service	Learn how AmeriCorps and its programs were created and have evolved.
	Review AmeriCorps Terms and Conditions	Review all information and requirements.
	Review National Community Service Trust Act of 1990, AmeriCorps Regulations, and AmeriCorps Grant Provisions	Review all information and requirements.
	Review approved AmeriCorps application, performance measures, and budget	Review all information and requirements. Note: An eGrants username and password is needed.
	Review Notice of Grant Award	The agency sent the Notice of Grant Award to the Authorized Representative at your organization upon grant award.
	Meet State Service Commission staff and get to know other AmeriCorps programs in your state	Review the State Service Commission webpage for contact information and states' specific websites.
	Get to know the AmeriCorps Staff supporting your project.	Grant awards not administered by State Service Commissions are managed directly by AmeriCorps staff in one of our eight regions in AmeriCorps' Office of Regional Operations. To learn more about the federal team supporting your organization's region, visit the AmeriCorps website .

Creating Accounts and Completing Required Training

Done?	Task	Purpose and/or Additional Context
	Create My AmeriCorps account	My AmeriCorps (or Member Portal) is the AmeriCorps electronic member management system.
	Add staff contact information to eGrants	Ensure the correct individuals are receiving important communications from AmeriCorps and AmeriCorps State and National.
	Review eGrants resources and tutorials	Resources will support you in navigating eGrants procedures and requirements.
	Complete required National Service Criminal History Check eCourse	Email serviceresources@cns.gov to request a new Litmos account (AmeriCorps Learning Management System). Save a copy of your certificate once you have completed the course.

Planning and Creating Programmatic Policies and Procedures

Done?	Task	Purpose and/or Additional Context
	Create policies and procedures for your program	Reference AmeriCorps Terms and Conditions , governing authorities for required policies, and the Resources for New AmeriCorps State and National Direct Grantees guide for suggested policies. Grant requirements mandate some policies, while your project has the discretion to develop other policies as long as you document policies, apply and universally follow policies, and align new policies with other organizational policies.
	Create position descriptions for staff: roles, responsibilities, and AmeriCorps member guidelines	Check all staff positions listed on approved budget or listed in application narrative. Ensure all job descriptions are complete, updated, and clearly delineate grant responsibilities.
	Create policies and procedures to meet all National Service Criminal History Check requirements	Consult with your Portfolio Manager and other programs for examples.
	Create or amend human resource policies to ensure AmeriCorps members are not treated as employees	Check with human resource department for personnel policies and reference regulations for member requirements.
	Review financial report requirements and develop policies and procedures to ensure compliance	AmeriCorps Terms and Conditions and governing authorities to determine requirements existing for both internal and external reports.
	Create project calendar	Grantees should create a calendar that includes all internal and external programmatic and fiscal deadlines.
	Review member benefits and create a member benefits plan	An overview of required member benefits can be found in the Resources for New AmeriCorps State and National Direct Grantees guide .
	Establish a system for member timekeeping	Timekeeping systems must comply with 2 CFR § 200.430 . Per the grant agreement recordkeeping requirements, timesheets must be stored and available on request by the AmeriCorps Office of Monitoring or the AmeriCorps Office of Inspector General as part of routine monitoring, audits, or investigations.
	Establish a system for staff timekeeping	Email serviceresources@cns.gov to request a new Litmos account (AmeriCorps Learning Management System) and view AmeriCorps Grantee Training: Ensuring Correct and Supported Salary Allocations course in Litmos for additional information.
	Establish a process for member record keeping	Grantees should have a system for storing all member documents and records.
	Create policies and procedures for your program	Reference AmeriCorps Terms and Conditions , governing authorities for required policies, and the Resources for New AmeriCorps State and National Direct Grantees guide for suggested policies. Grant requirements mandate some policies, while your project has the discretion to develop other policies as long as you document policies, apply and universally follow policies, and align new policies with other organizational policies.

Establishing Financial and Grants Management

Done?	Task	Purpose and/or Additional Context
	Review financial report requirements and develop policies and procedures to ensure compliance	Requirements exist for both internal and external reports. Review the AmeriCorps Terms and Conditions and the regulations to determine requirements.
	Create process that regularly allows the review of actual to budgeted expenses	Consult with your accounting department for internal reviews. Your chart of accounts must correlate to the approved grant budget expense line items.
	Create process to submit Federal Financial Reports (FFRs)	Financial Grants Management processes should follow your organizations' policies and procedures. If your organization does not have these policies and procedures, utilize 2 CFR to guide the development of them. Contact your Portfolio Manager with any questions about w this process.
	Create invoicing and reimbursement processes and deadlines	Documents vary depending on the grantee. Consult with your internal departments to determine if these processes exist or if you need to create them.

Establishing Reporting and Data Collection Systems

Done?	Task	Purpose and/or Additional Context
	Create a data collection plan	A data collection plan ensures you know what data to collect, where to find data, who can collect program data effectively, and when to collect and analyze data for reporting requirements and program improvement.
	Create tools for data collection	Refer to the Performance Measures Instructions to see how to measure/collect data for the Performance Measures you've chosen. The data collection instrument you use, whether it's one you've created or is a tool that exists already, should provide valid and reliable data that measures the change you want to capture.
	Create a data reporting system	Ensure that you have created a system that stores data securely and allows data to be easily analyzed for reporting. Consider reporting deadlines and be aware of what you need to report so that all requirements are met.
	Review Grantee Progress Report (GPR) processes and deadlines	Develop systems to periodically collect information to ensure information is readily available when a GPR is due. Check with your Portfolio Manager for more reporting information.

Developing Site Management Tools

Done?	Task	Purpose and/or Additional Context
	Create site agreements	Leverage the AmeriCorps Terms and Conditions and governing authorities to create a successful service site agreement.
	Create a site visit and monitoring plan	Site visits and monitoring ensure that your service sites are compliant with all grant requirements.
	Create an orientation and ongoing training plan for site supervisors	Leverage the Resources for New AmeriCorps State and National Direct Grantees guide .

Implementing Member Recruitment, Screening, and Selection Processes

Done?	Task	Purpose and/or Additional Context
	Develop an internal member application process	An internal member application process will ensure a successful member recruitment, screening, and selection process.
	Create process for member National Service Criminal History (NSCHC) checks	The NSCHC guidance provides an overview of all requirements.
	Create member position descriptions	This guidance outline is a training tool designed to help new AmeriCorps project staff create a strong member position description. It will be most helpful when used alongside the Grant Terms and Conditions, AmeriCorps Regulations, and other agency-specific guidance.
	My AmeriCorps Portal: Create member position listing	Member recruitment resources include a member position listing template and a tutorial for posting in My AmeriCorps Portal.
	Create process for member enrollment	Member enrollment resources include enrollment guidance and an overview of the member enrollment process.
	My AmeriCorps Portal: Enroll selected members	Member enrollment resources include enrollment guidance and an overview of the member enrollment process.
	My AmeriCorps Portal: Assign member service locations	Utilize the “Managing Your Program in eGrants - Direct Grantees” document to assign member service locations.

Preparing for Member Management

Done?	Task	Purpose and/or Additional Context
	Create member service agreements	The AmeriCorps member service agreement thoroughly describes the relationship between an individual (an AmeriCorps member) and the AmeriCorps project, and it is a requirement in the AmeriCorps Grant Terms and Conditions .
	Create plan for member orientation and ongoing training	Leverage the Resources for New AmeriCorps State and National Direct Grantees guide .
	Design process for member mid and end-of-term performance reviews	Grantees must conduct and keep a record of at least a midterm and an end-of-term written evaluation of each member’s performance for fulltime members and an end-of-term written evaluation for all less-than-full-time members. See the AmeriCorps Grant Terms and Conditions for specific requirements.